

The Outlook for U.S. Natural Gas Markets

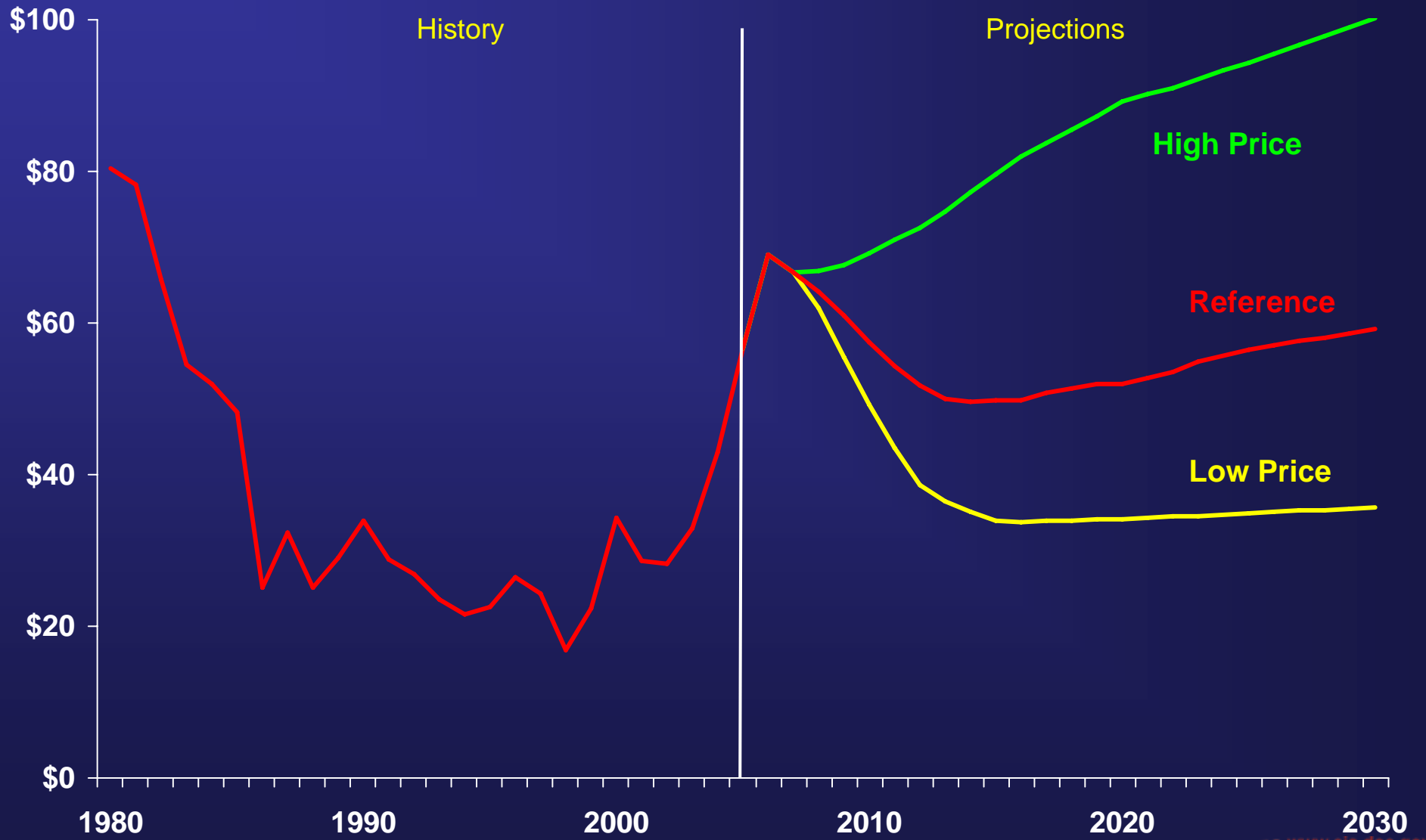
**Guy Caruso, Administrator
Energy Information Administration
U.S. Department of Energy**

**15th International Conference on Liquefied Natural Gas
April 24-27, 2007
Barcelona, Spain**

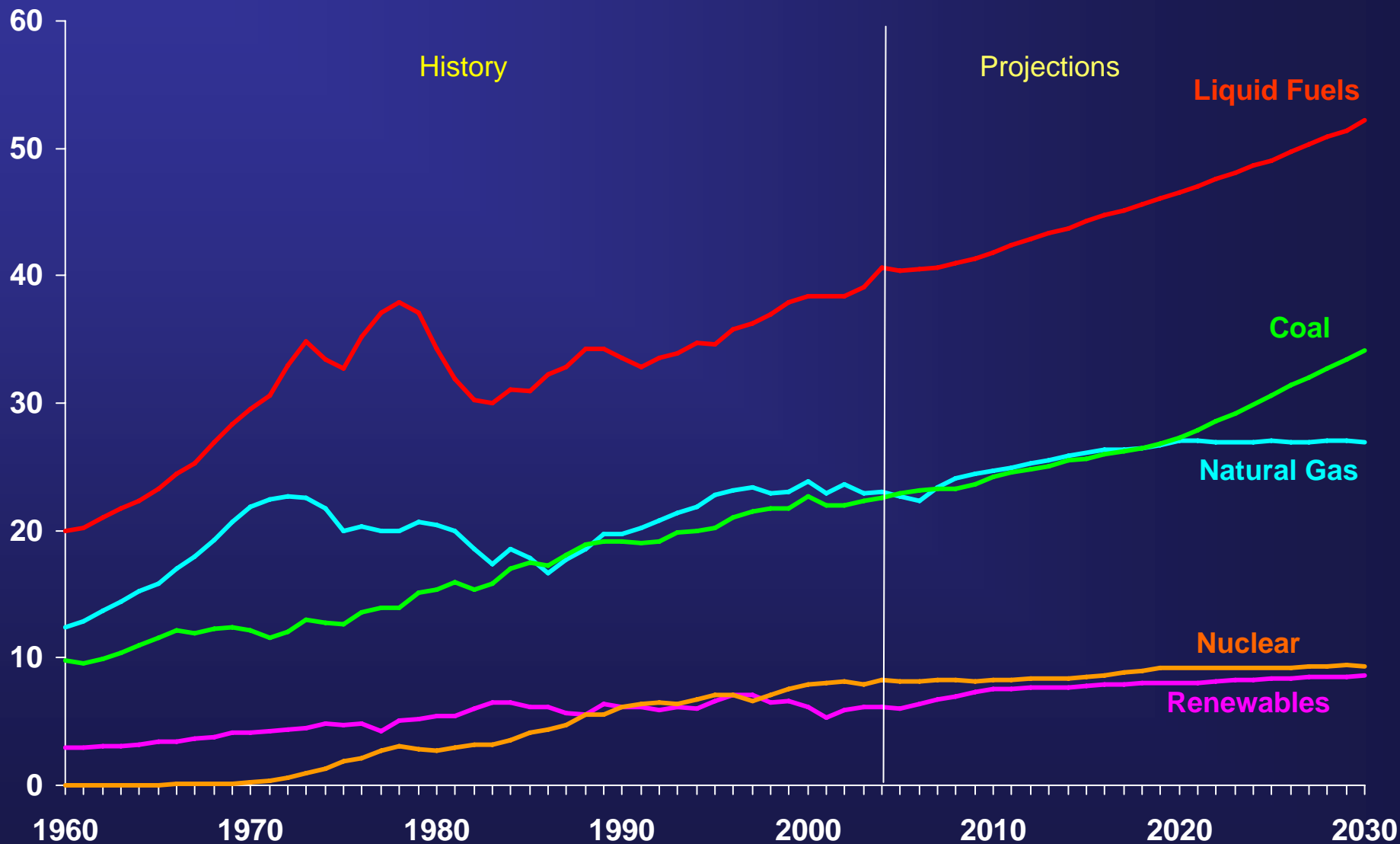
***Annual Energy Outlook 2007* reference case indicates that through 2030....**

- U.S. energy demand is projected to grow at an average annual rate of 1.1 percent
- The energy efficiency of the economy is projected to increase at an average annual rate of 1.8 percent
- U.S. oil import dependency is projected to grow from 60 percent to 61 percent
- U.S. natural gas use is projected to peak around 2020
- Future growth in U.S. natural gas supplies depends on unconventional domestic production, natural gas from Alaska, and liquefied natural gas imports
- Carbon dioxide emissions are projected to grow at an average annual rate of 1.2 percent

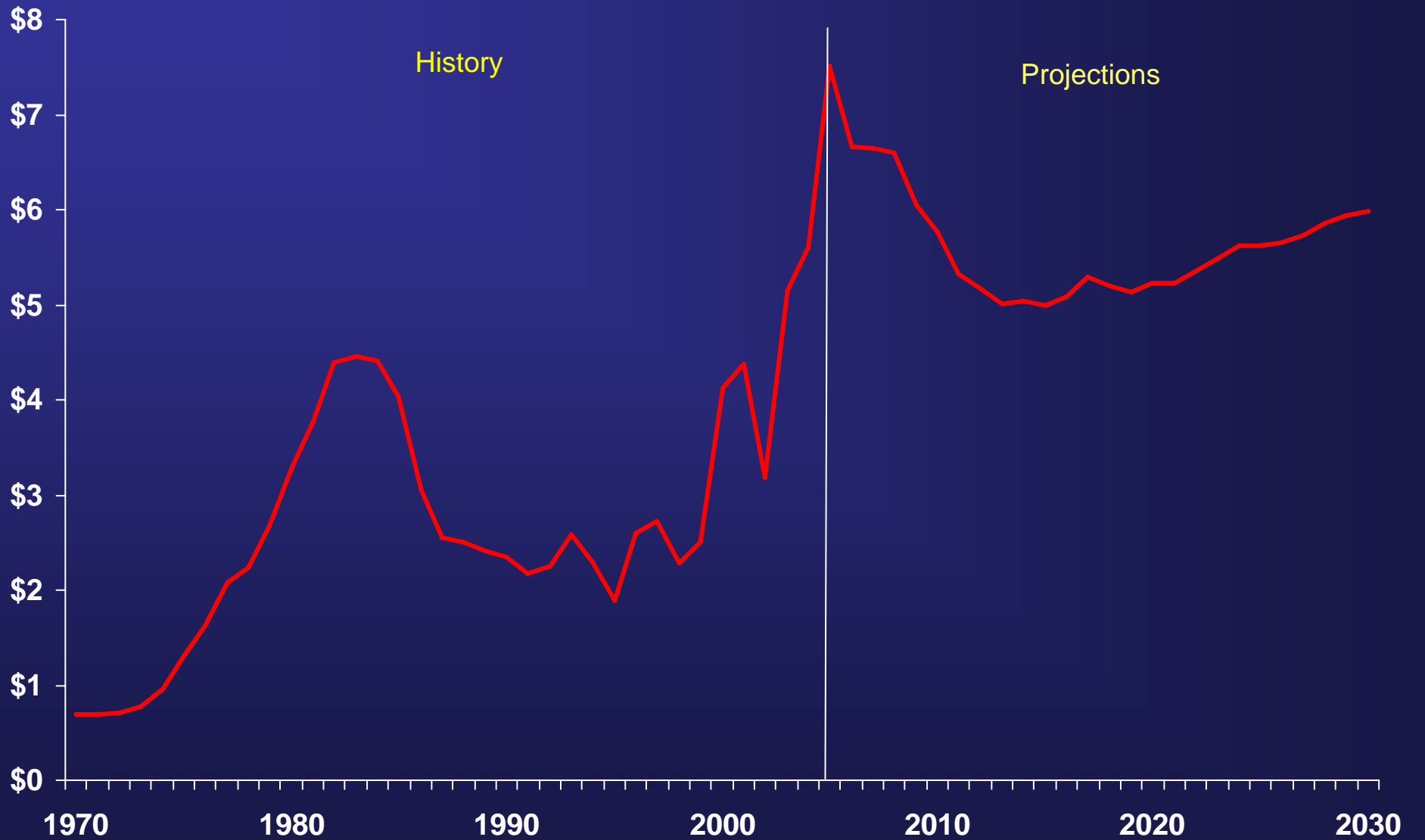
World Oil Price, 1980-2030 (2005 dollars per barrel)



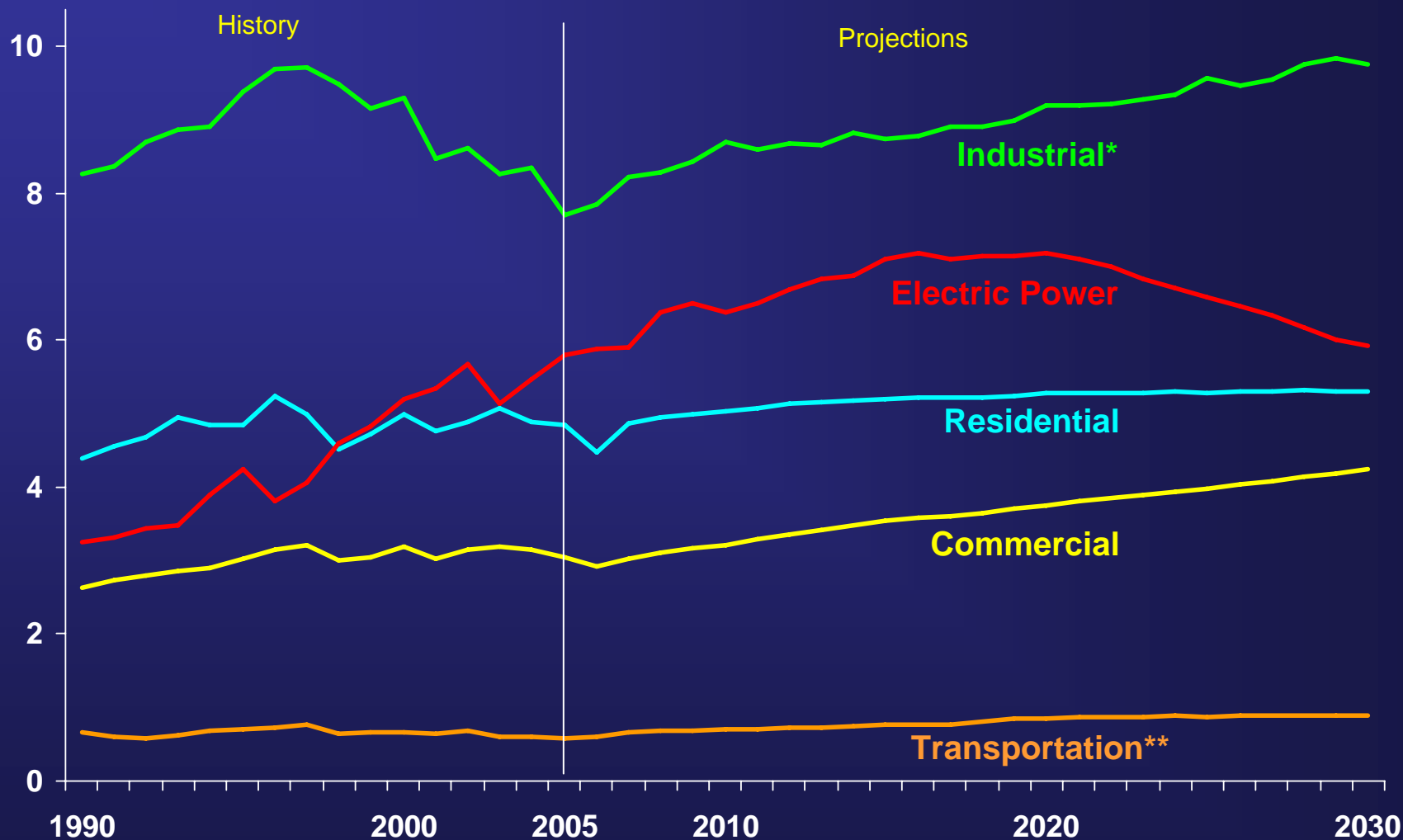
U.S. Primary Energy Consumption by Fuel, 1960-2030 (quadrillion Btu)



U.S. Natural Gas Wellhead Price, 1970-2030 (2005 dollars per thousand cubic feet)



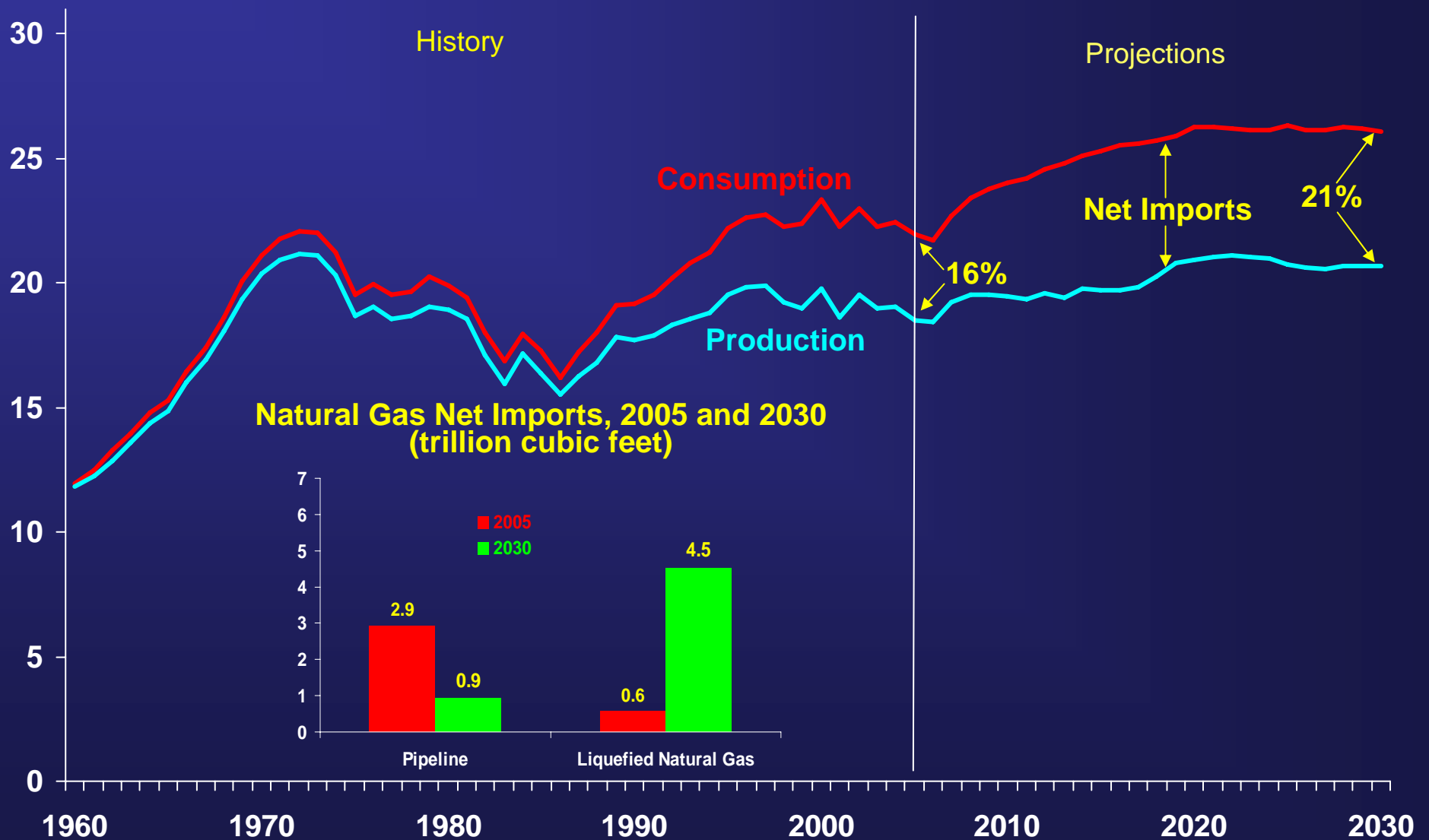
U.S. Natural Gas Consumption by Sector, 1990-2030 (trillion cubic feet)



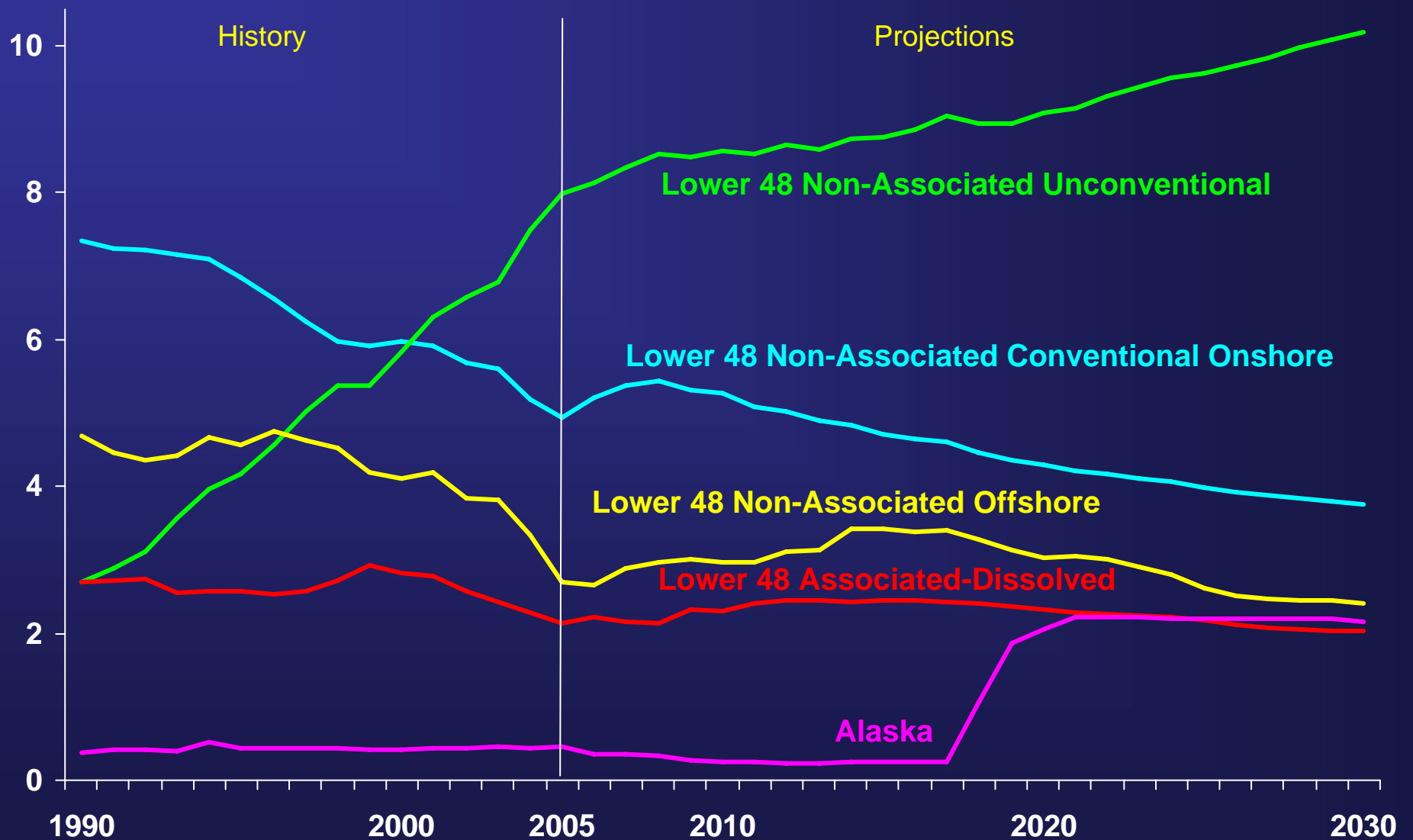
* Includes lease and plant fuel

** Includes pipeline fuel

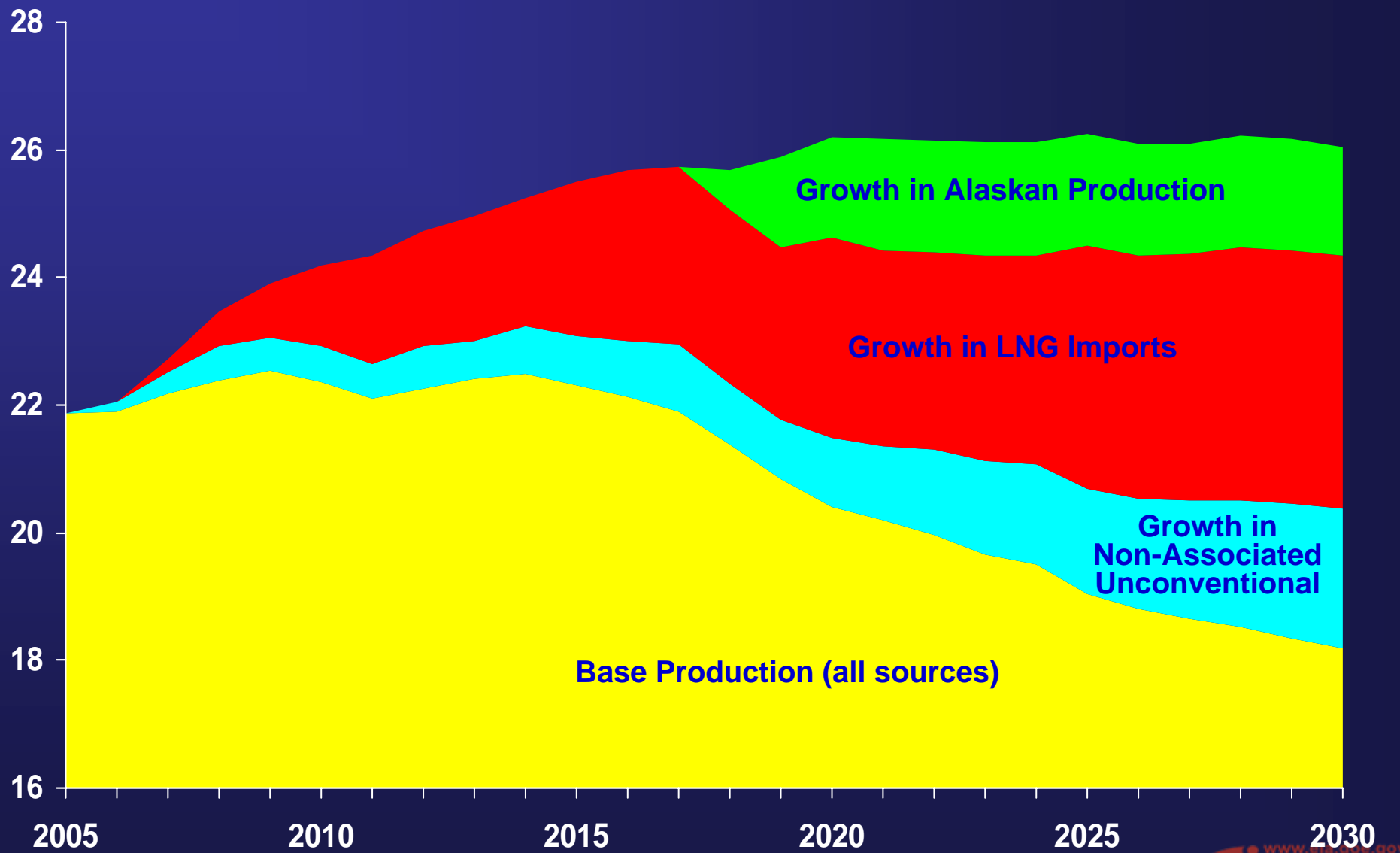
U.S. Natural Gas Production, Consumption, and Net Imports, 1960-2030 (trillion cubic feet)



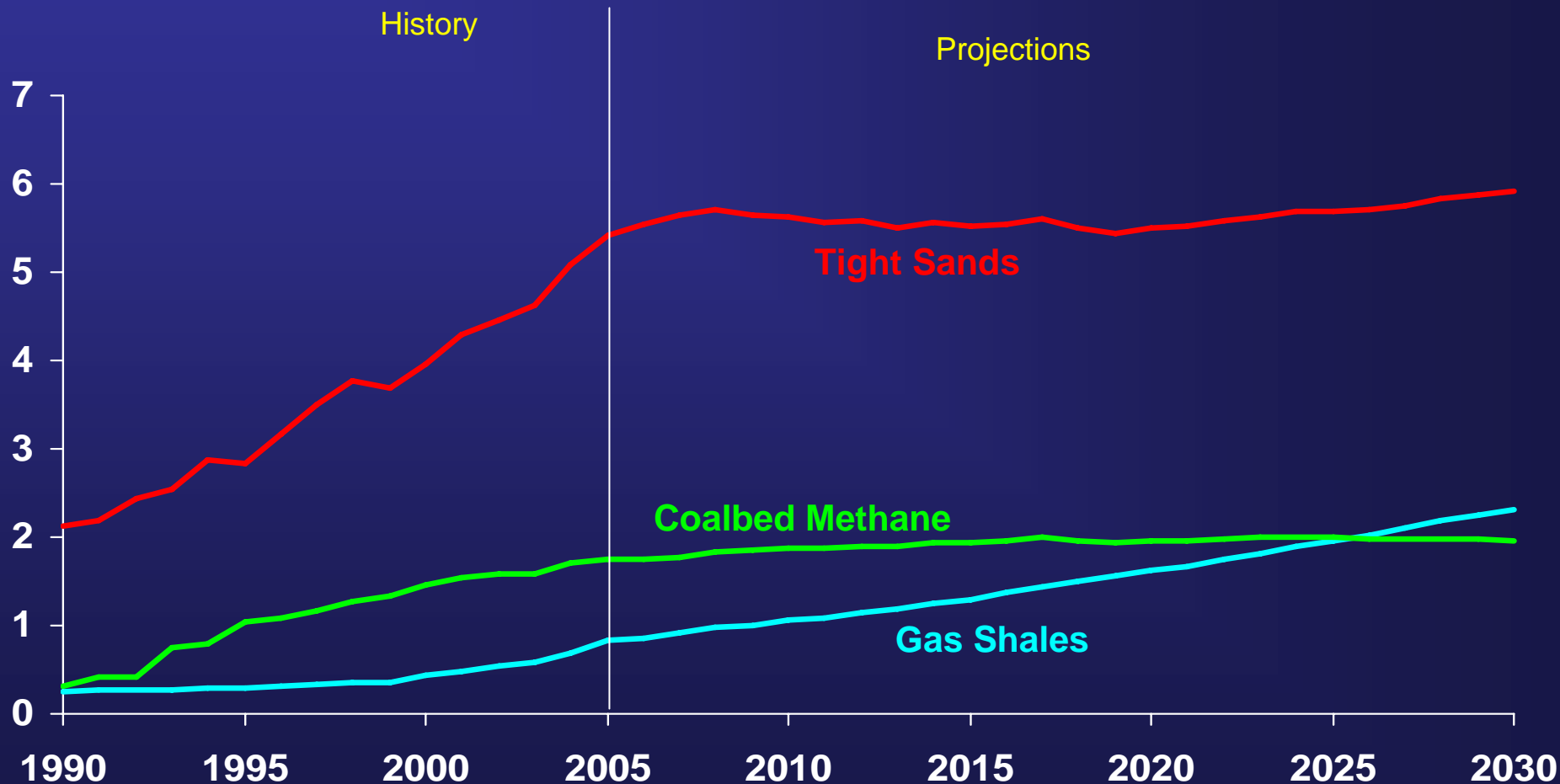
U.S. Natural Gas Production by Source, 1990-2030 (trillion cubic feet)



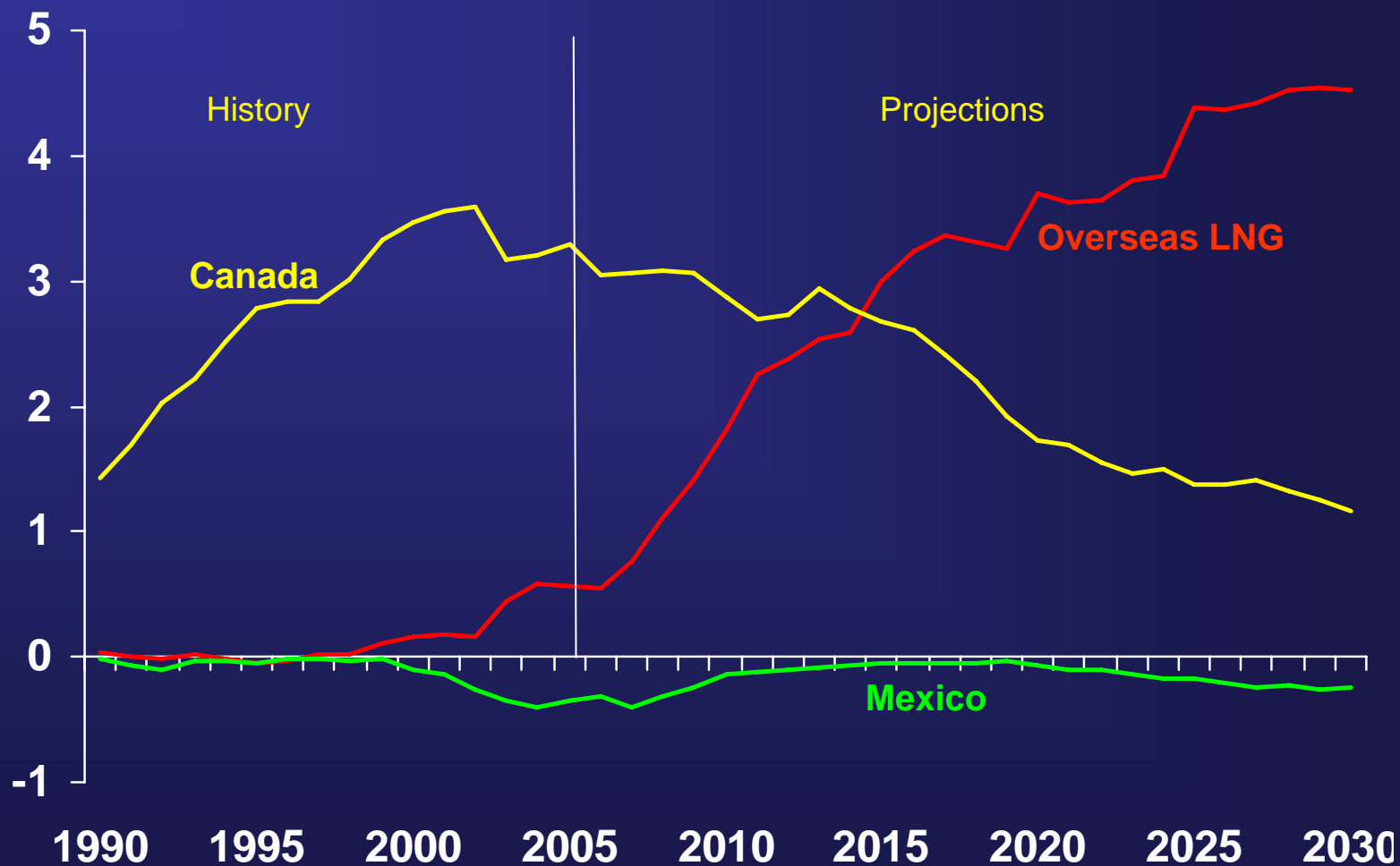
Major Sources of Incremental U.S. Natural Gas Supply, 2006-2030 (trillion cubic feet)



U.S. Unconventional Natural Gas Production, 1990-2030 (trillion cubic feet)



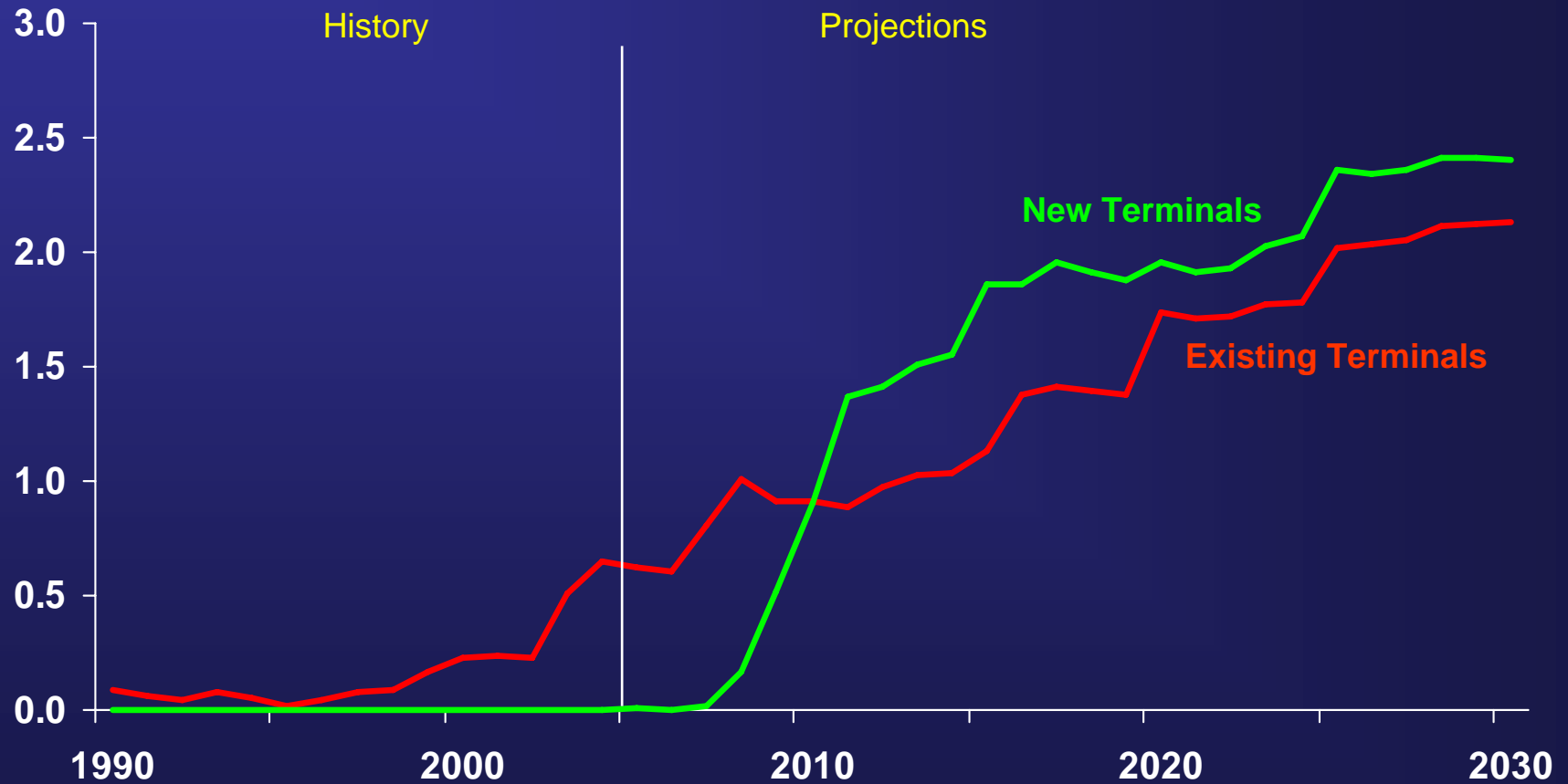
U.S. Net Imports of Natural Gas, 1990-2030 (trillion cubic feet)



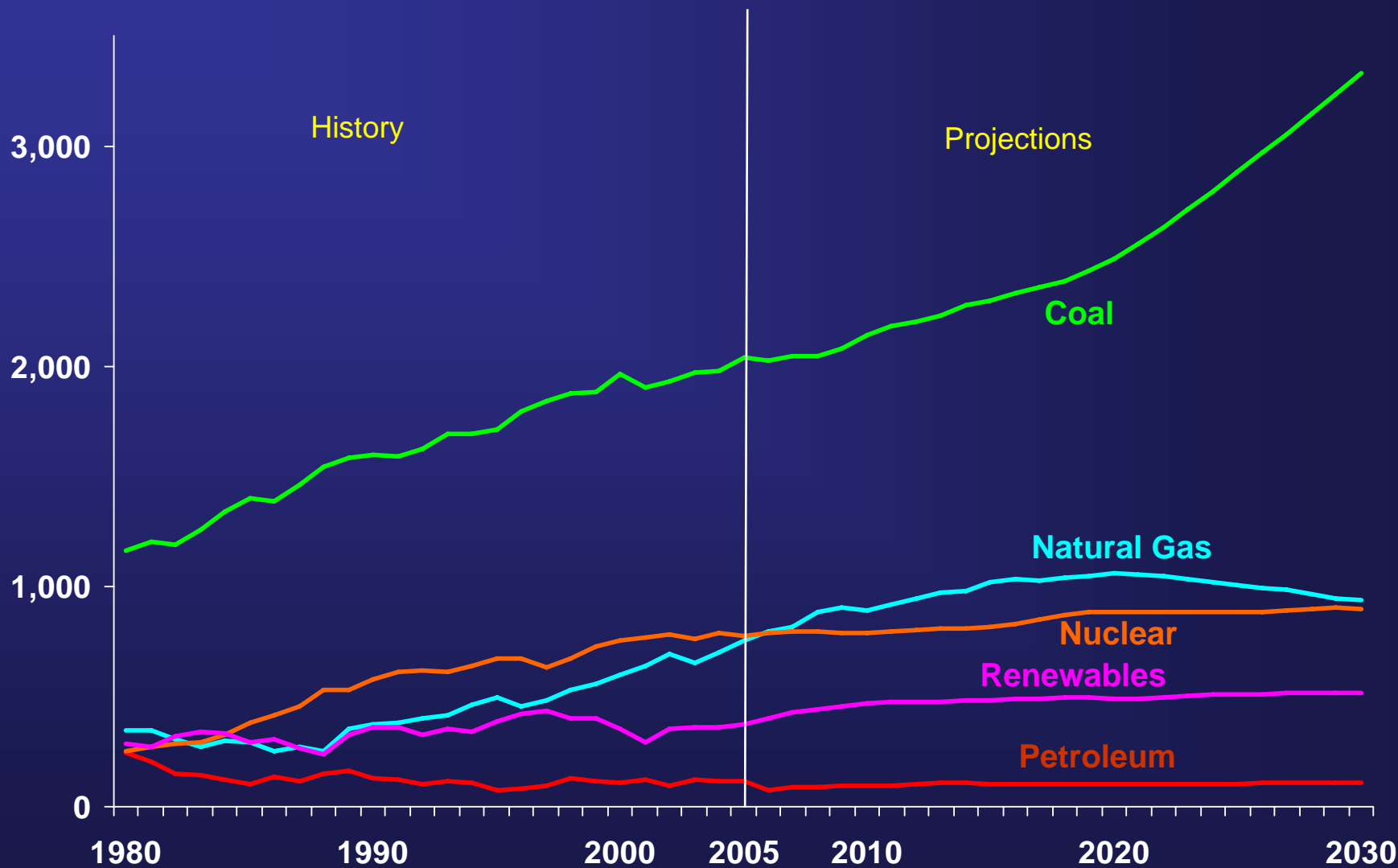
Current U.S. LNG Import Terminals



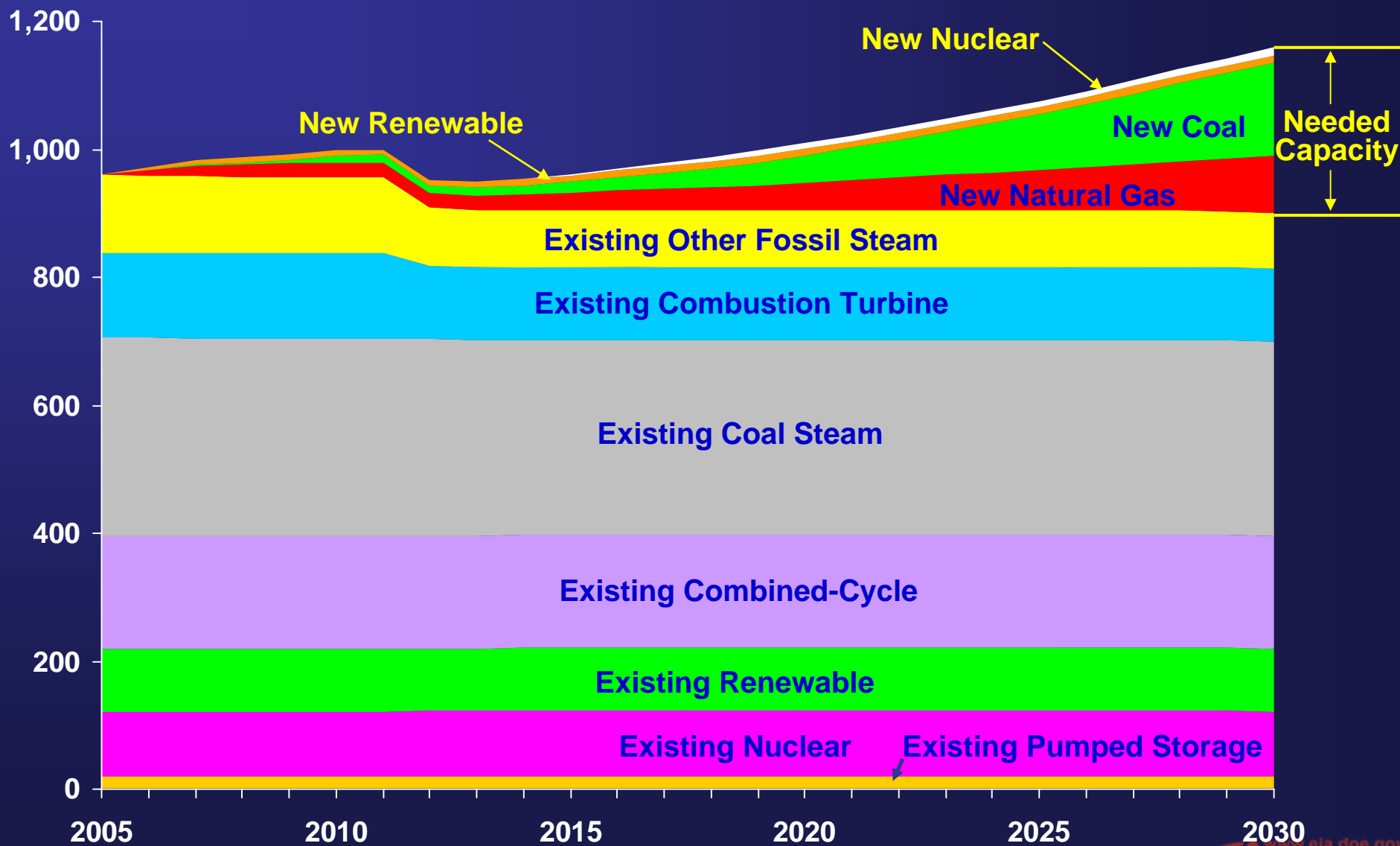
U.S. LNG Imports, 1990-2030 (trillion cubic feet)



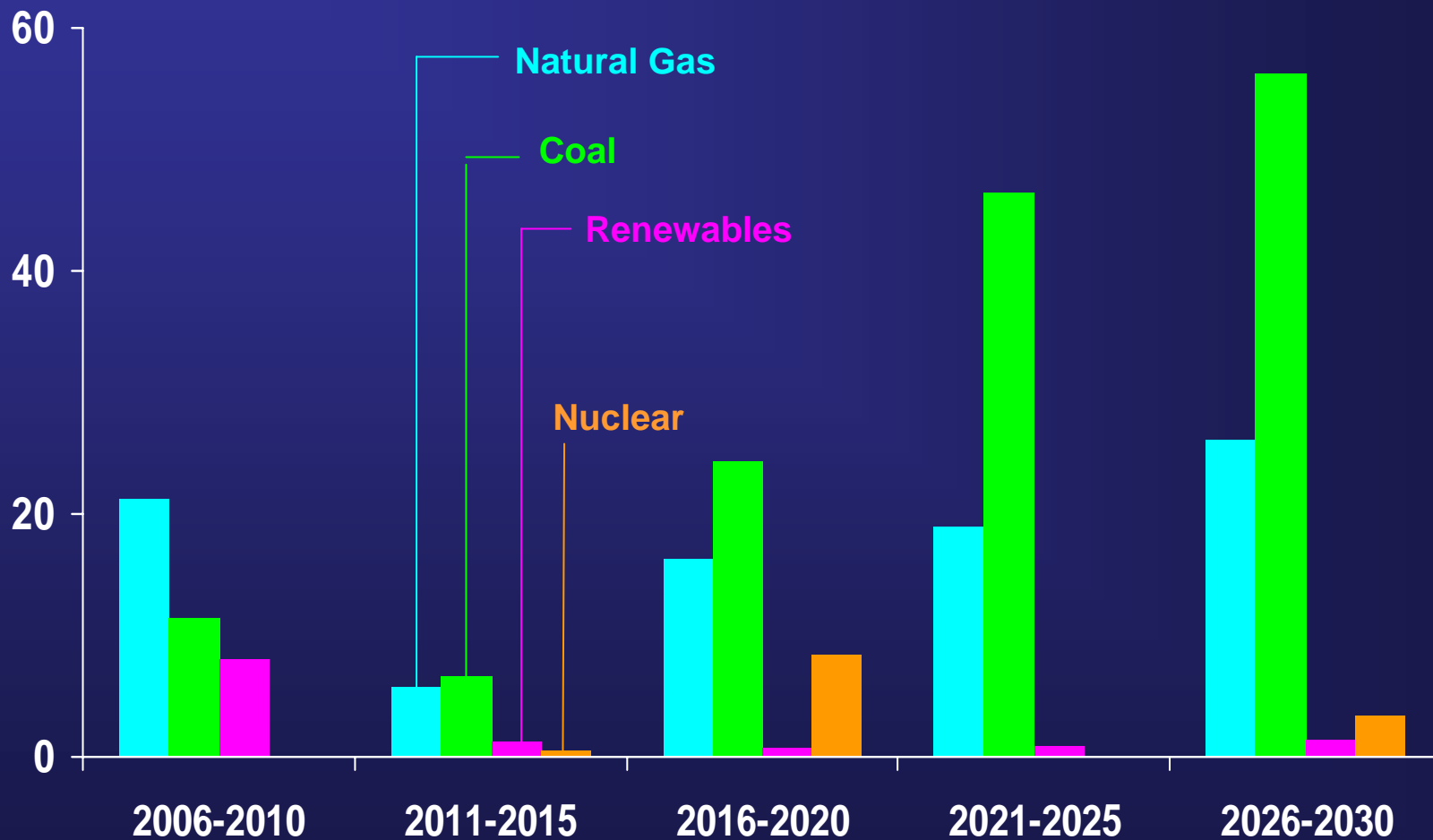
U.S. Electricity Generation by Fuel, 1980-2030 (billion kilowatthours)



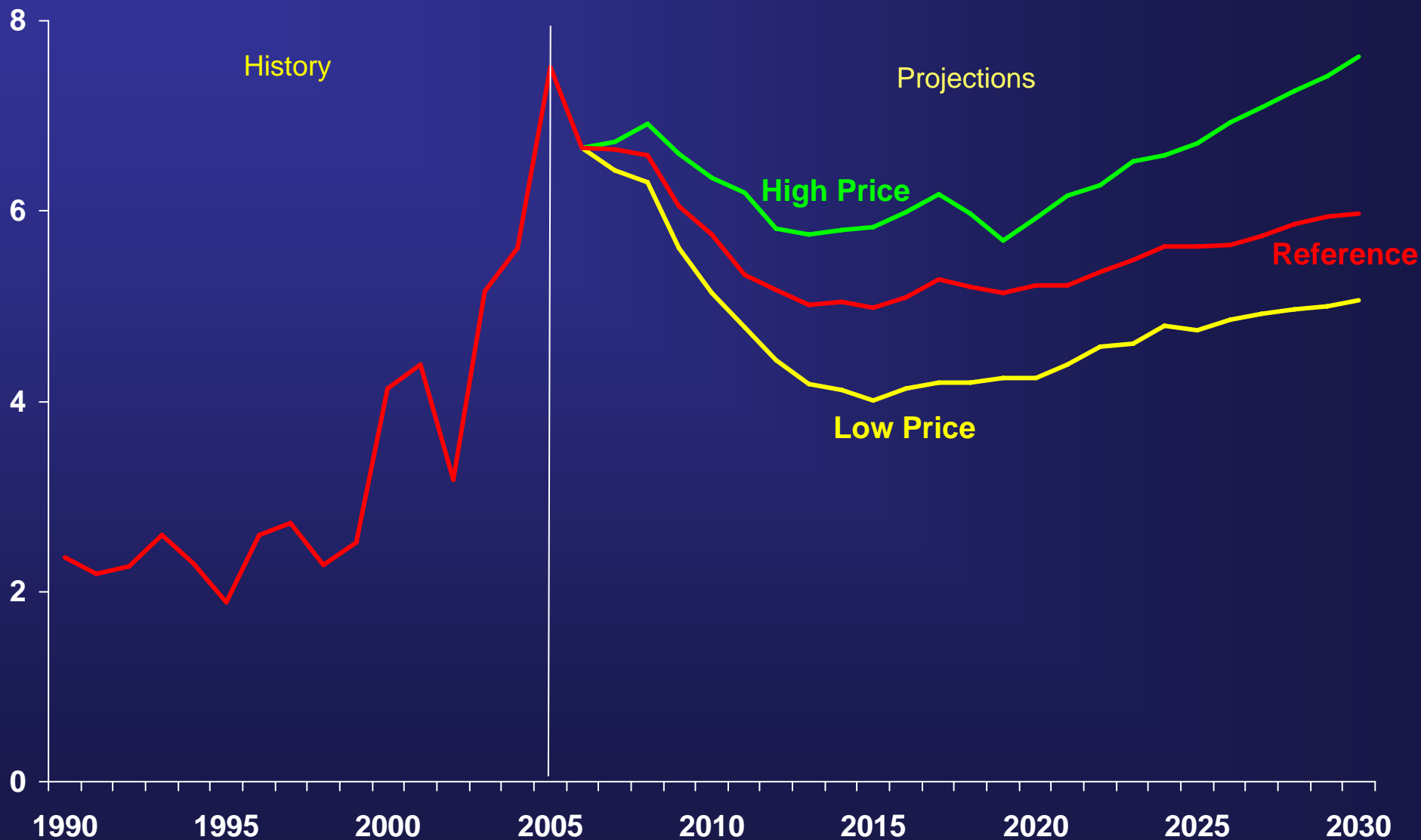
U.S. Electricity Generating Capacity, including Combined Heat and Power, 2005-2030 (gigawatts)



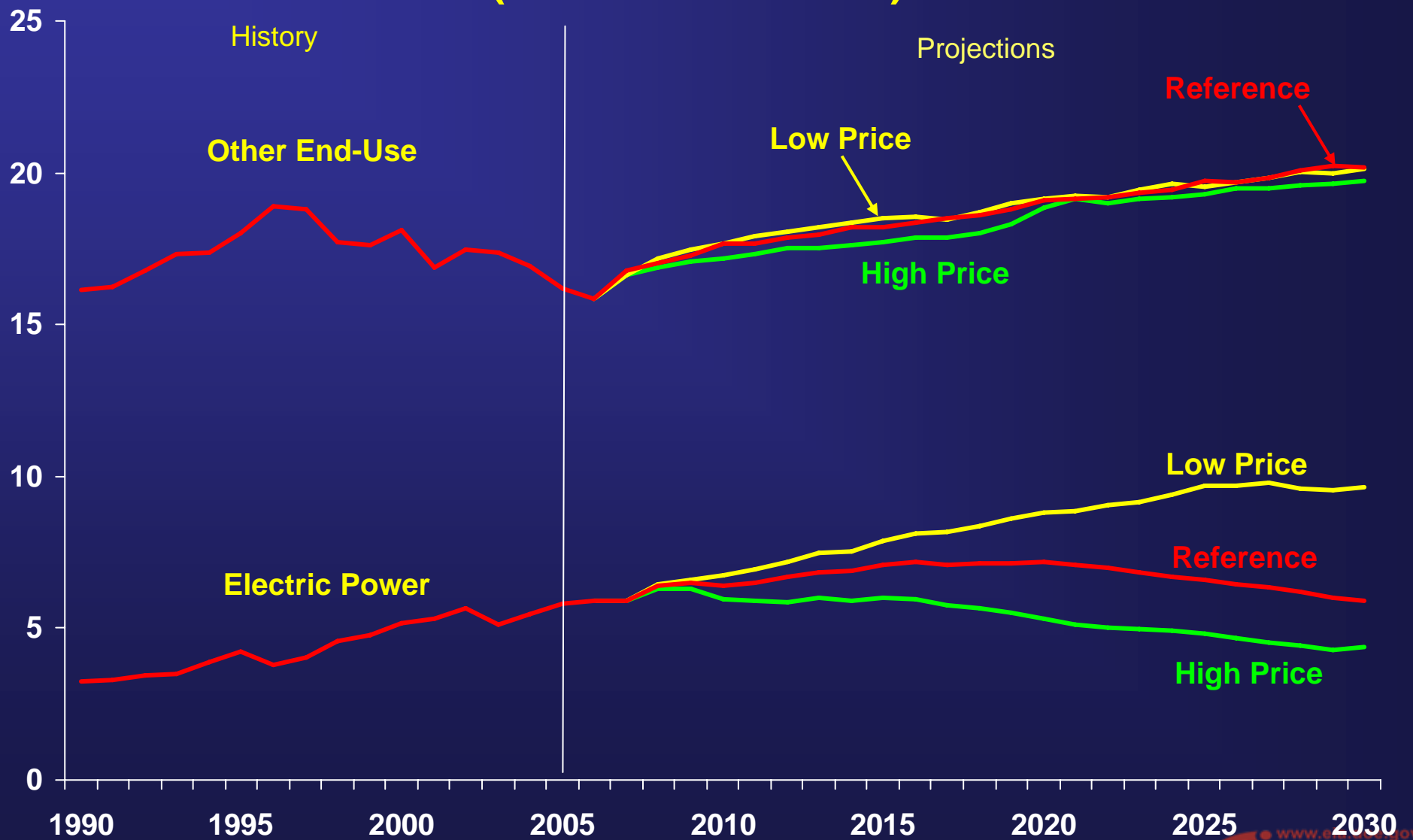
U.S. Electricity Generation Capacity Additions by Fuel, 2006-2030 (gigawatts)



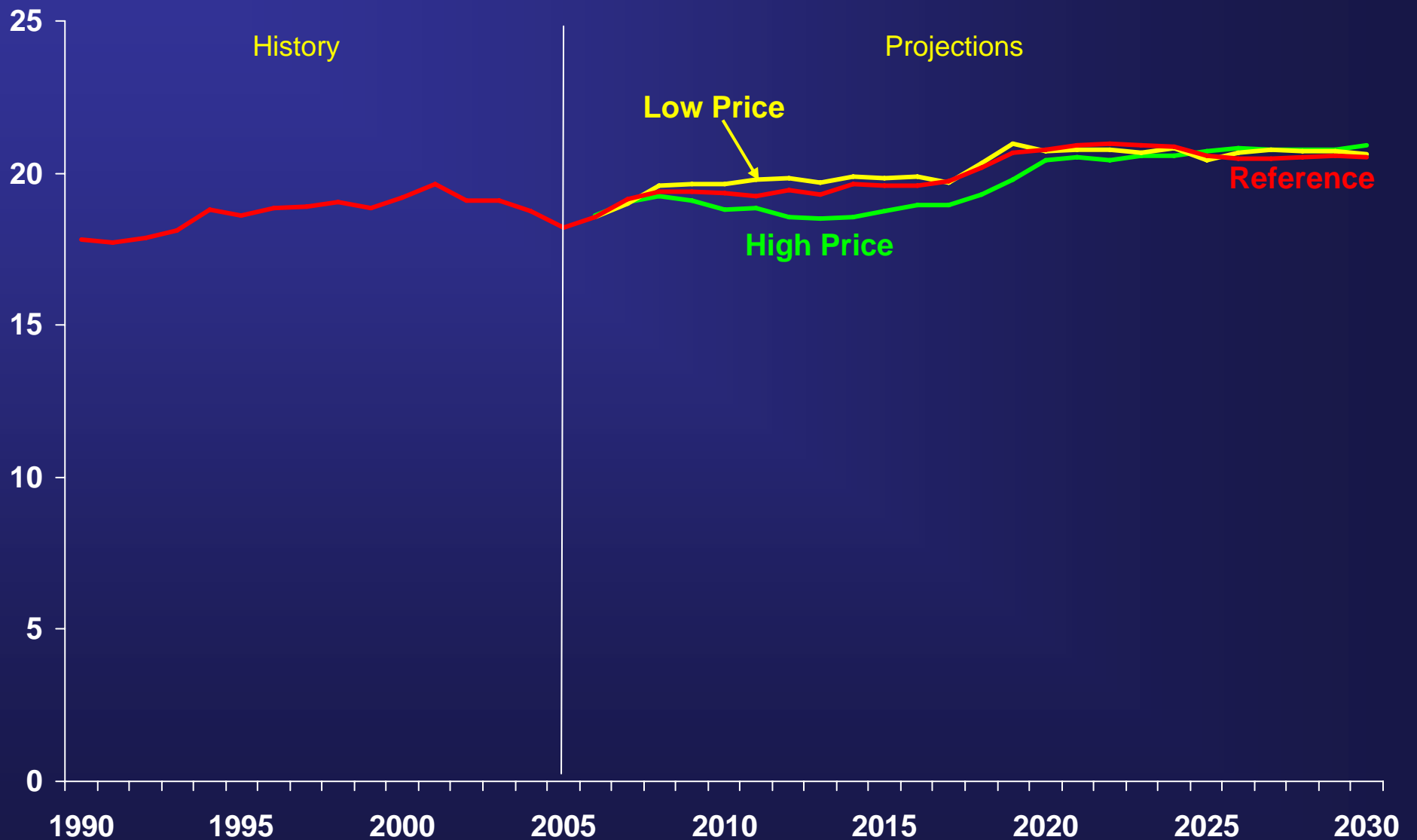
Lower 48 Wellhead Natural Gas Prices in Alternative Cases, 1990-2030 (2005 dollars per thousand cubic feet)



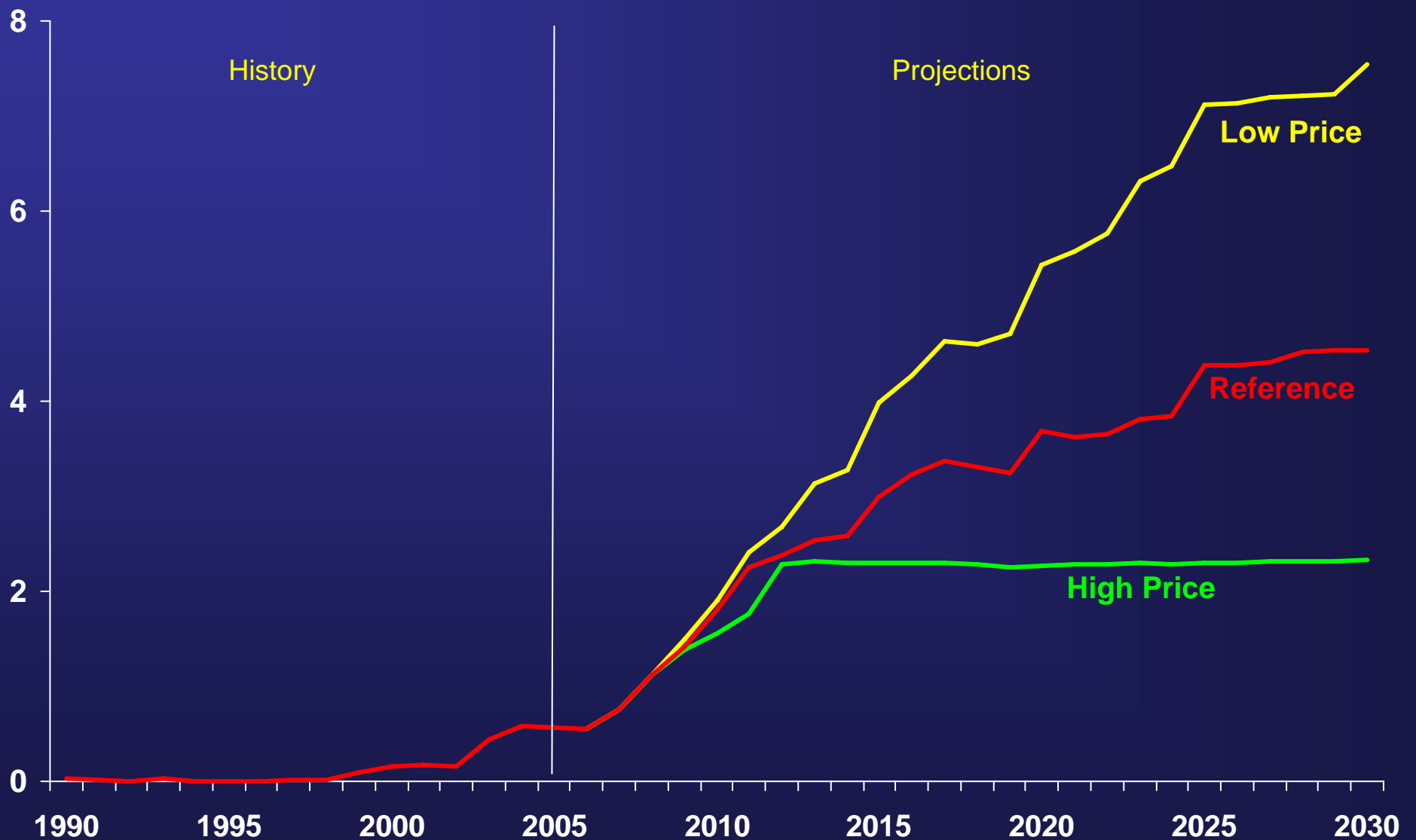
Natural Gas Consumption in the Electric Power and Other End-Use Sectors in Alternative Price Cases, 1990-2030 (trillion cubic feet)



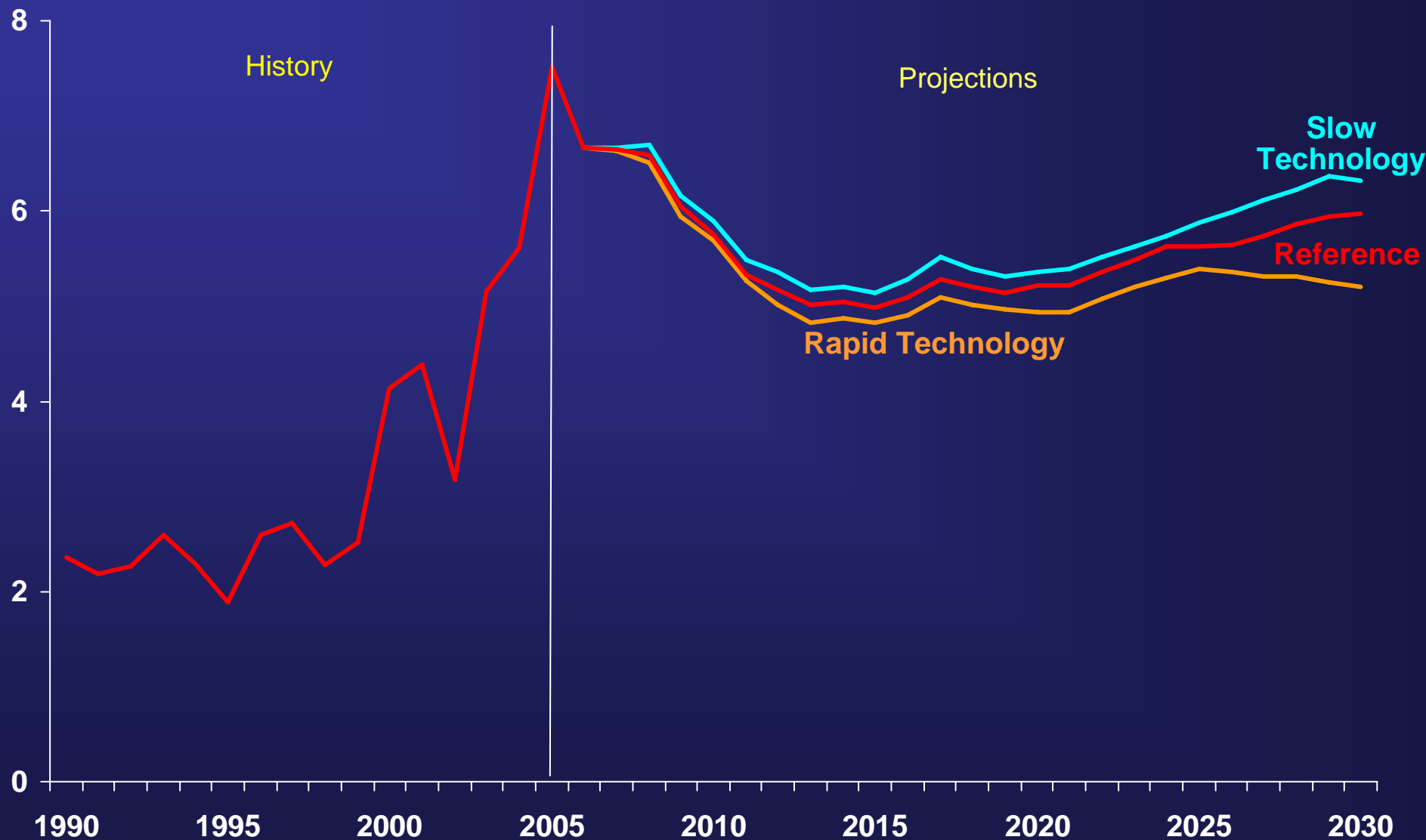
Total U.S. Natural Gas Production in Alternative Cases, 1990-2030 (trillion cubic feet)



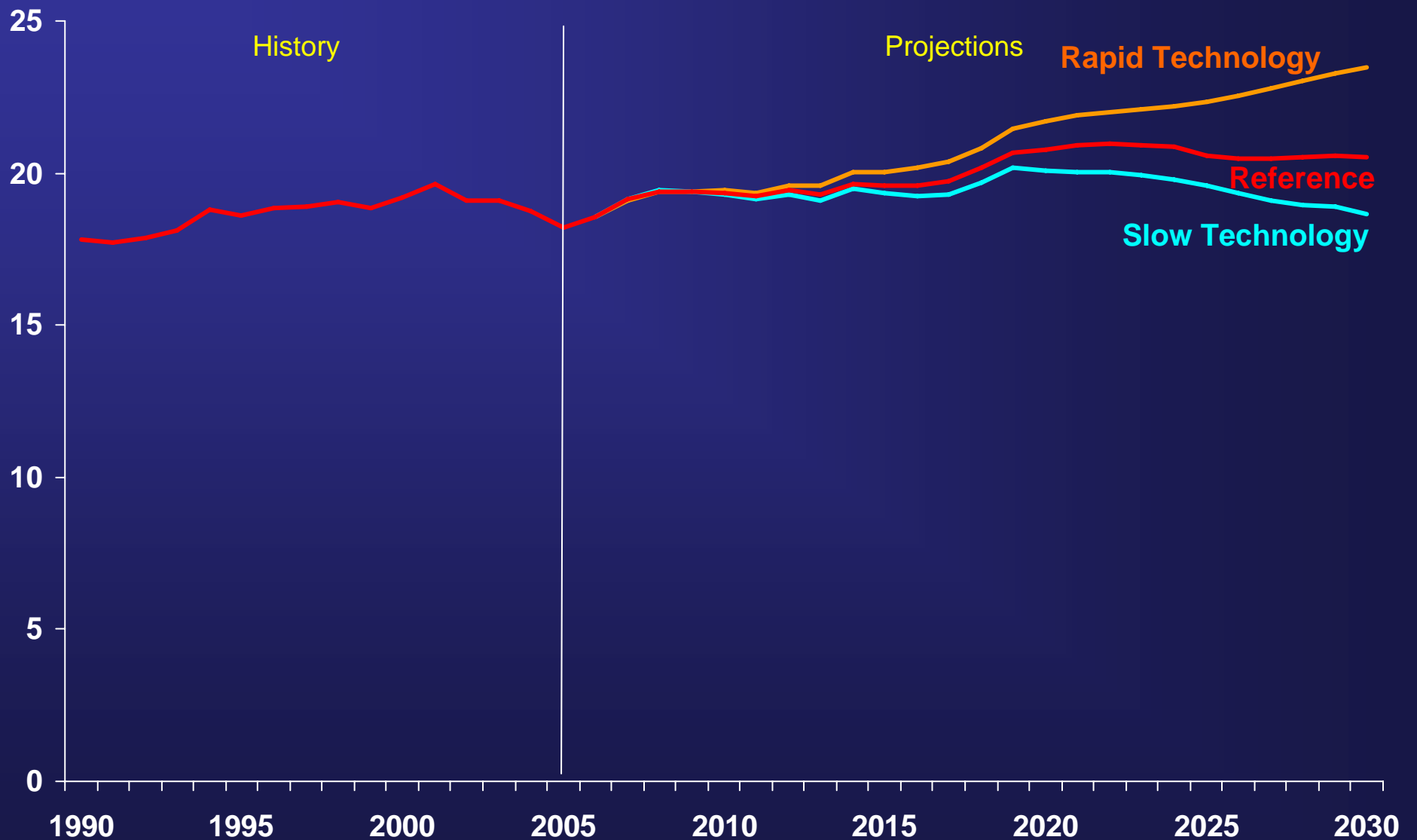
Net U.S. Imports of Liquefied Natural Gas in Alternative Cases, 1990-2030 (trillion cubic feet)



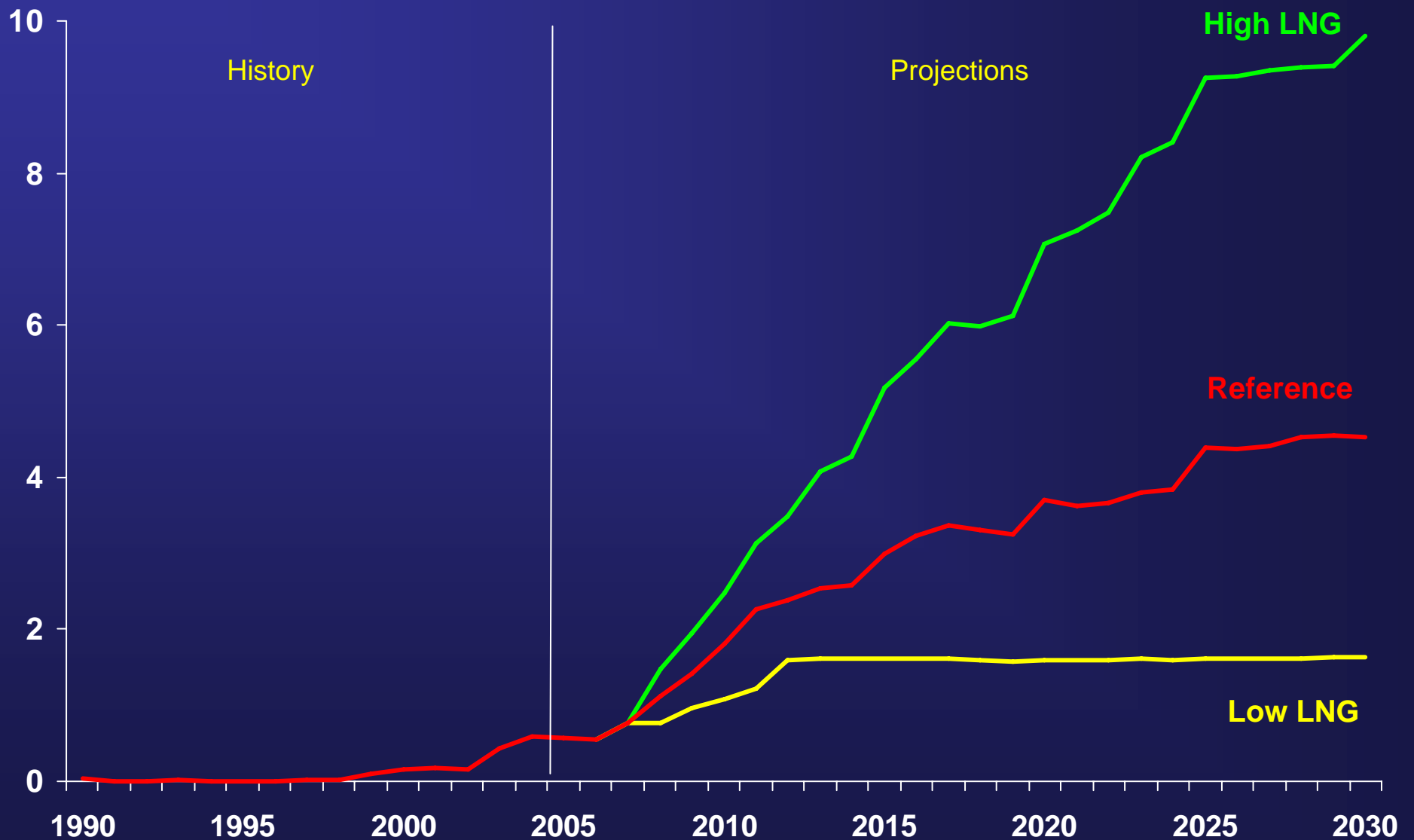
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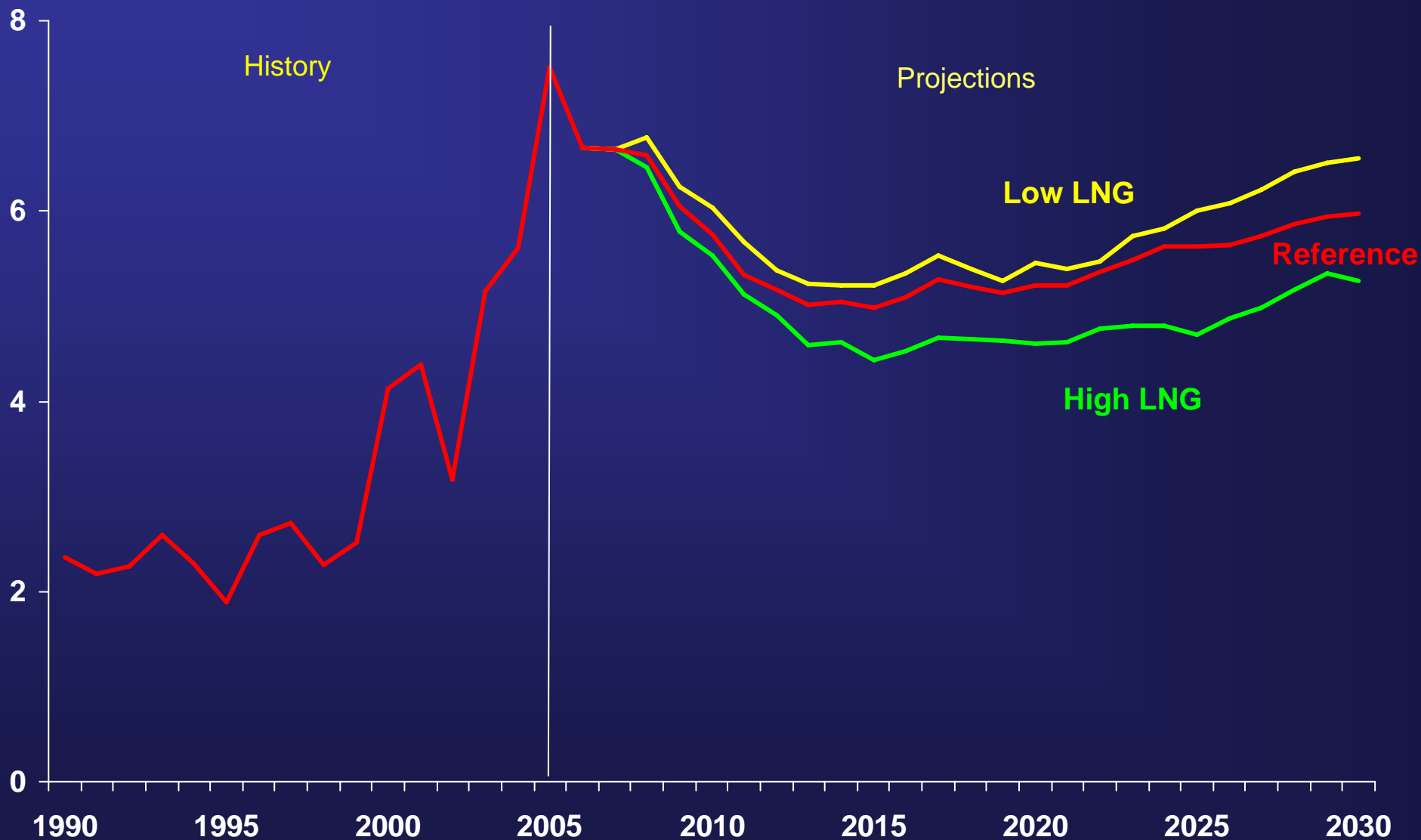
Total U.S. Natural Gas Production in Alternative Cases, 1990-2030 (trillion cubic feet)



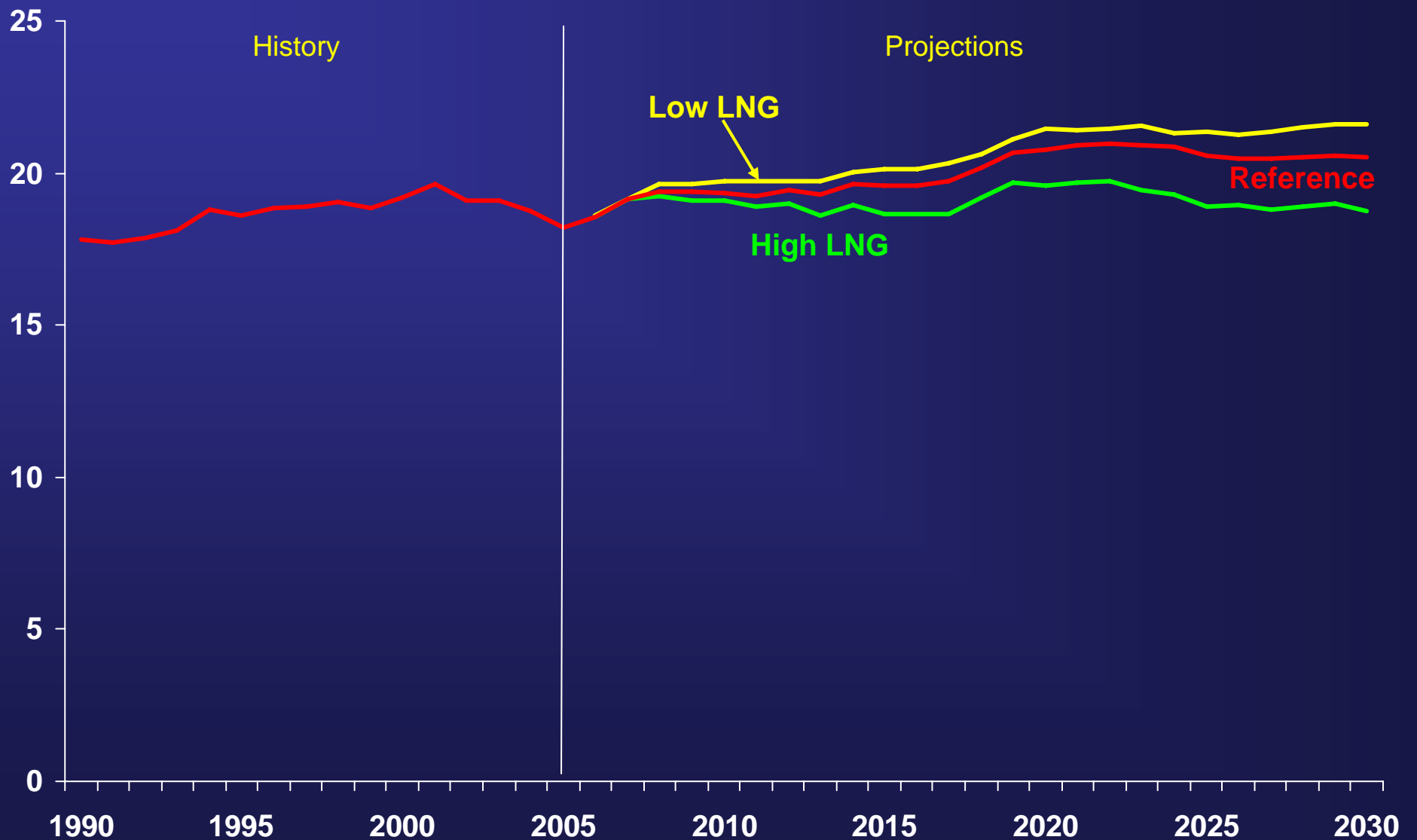
Net U.S. Imports of Liquefied Natural Gas in Alternative Cases, 1990-2030 (trillion cubic feet)



Lower 48 Wellhead Natural Gas Prices in Alternative Cases, 1990-2030 (2005 dollars per thousand cubic feet)



Total U.S. Natural Gas Production in Alternative Cases, 1990-2030 (trillion cubic feet)



Periodic Reports

Petroleum Status and Natural Gas Storage Reports, weekly

Short-Term Energy Outlook, monthly

Annual Energy Outlook 2007, February 2007

International Energy Outlook 2006, June 2006, next release in May 2007

Examples of Special Analyses

“Economic Effects of High Oil Prices,” Annual Energy Outlook 2006

Analysis of Oil and Gas Production in the Arctic National Wildlife Refuge,
March 2004

The Global Liquefied Natural Gas Market: Status and Outlook, December 2003

“Restricted Natural Gas Supply Case,” Annual Energy Outlook 2005

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